Job Aid:
How to Create a Bid Using Rolling and Open Enrollment

This Job Aid Shows How To:

- Create a Bid Using Rolling and Open Enrollment

Of Special Note:

Guidance for rolling and open enrollments can be found in Section III, E, xi, c of the Best Value Procurement Handbook.

Rolling Enrollment:
- Allows you to accept bids and review them as they come.
- Has one enrollment period to award vendors to an established contract
- Allows purchaser to award vendors anytime
- Must act as informal

Open Enrollment:
- Allows the Strategic Sourcing Services Team (SSST) to re-open the contract at any time (or at set intervals) to add new vendors.
- Allows adding vendors to an established contract
- Allows awarding to vendors during the open enrollment period
- Has multiple quote submission periods
- Must act as informal

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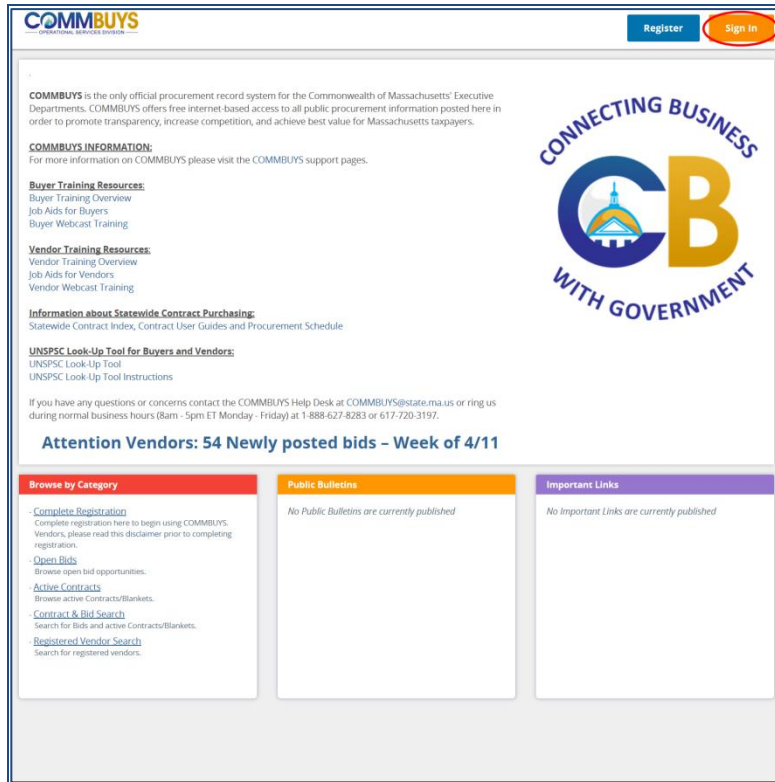
Screenshot	Directions
	Step 1: Accessing the COMMBUYS Landing Page 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner. 3. Enter your Login ID and Password and click on the **Sign In** button.

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Step 2: Creating a New Bid

1. Click on the **Add Documents** (plus sign) icon.

2. Select **Bid Solicitation** from the dropdown menu.
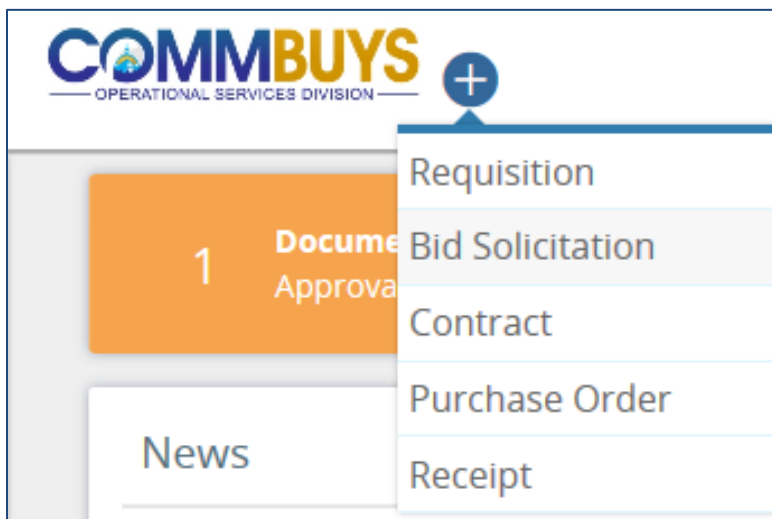
Step 3: Creating a New Bid From Scratch

1. Ensure that the **Create a bid from scratch** radio button is pre-selected.

2. Click on the **Continue** button.

Step 4: Completing the Left Side of the New Bid Screen

1. The New Bid screen opens to the General tab. On the left side of the screen, all fields with an asterisk are required. The required fields are:
   - **Department**: This defaults from the user profile. It may be changed using the dropdown if other departments are available to the user.
   - **Location**: This defaults from the user profile. It may be changed using the dropdown if other locations are available to the user.
   - **Available Date**: This field identifies when the bid becomes available for viewing. Clicking the calendar icon next to this field displays the current date and time. Clicking the **Now** button inserts the current date and time into this field. Click the **Done** button when you have entered the desired date. You can enter a different date and/or time using the calendar and scroll bar. **NOTE:** If you need to change the calendar year, do so before changing the month and day.
   - **Purchase Method**: Open Market defaults from the dropdown menu**.**
   - **SBPP** (**Small Business Purchasing Program) Eligible?:** Select "Yes" if up to $150K or "No" if over $150K

2. Optional fields include:
   - **Info Contact:** The contact person for this bid.
   - **Pre-Bid Conference:** This field is available to capture bid conference information if applicable.
   - **Bulletin Description:** This field is available for a brief description of the bid and how it will display.
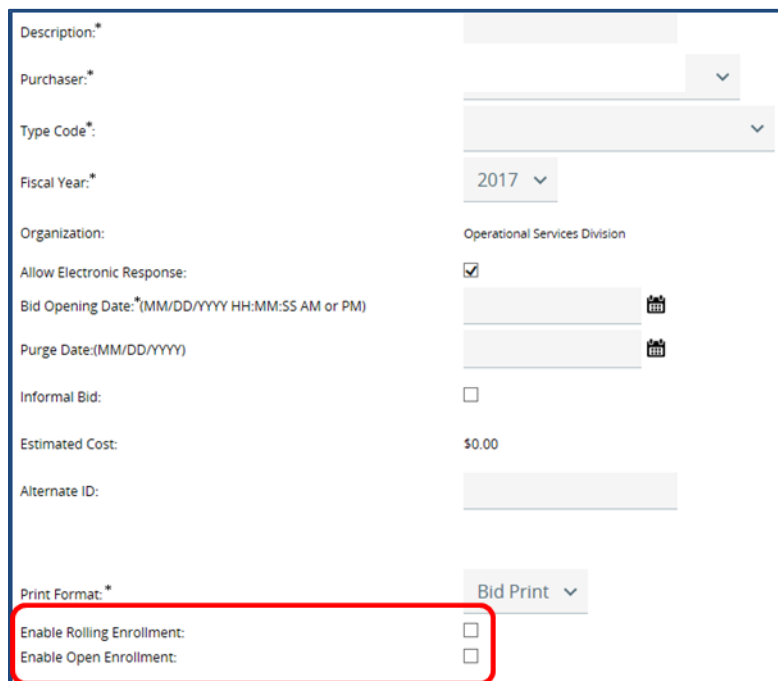
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Step 5: Completing the Right Side of the New Bid Screen

1. All fields with an asterisk are required. The required fields are:
   - **Description**: Title of your bid. This field is used as search criteria to locate a bid, so be specific.
   - **Purchaser**: This defaults to your name. Use the dropdown to select a different purchaser.
   - **Type Code**: NS (non-statewide solicitation) – if posted for a good or service not on a SWC. SS (statewide solicitation) – if posted as a requirement for purchasing off a SWC.
   - **Fiscal Year**: This field defaults to the current Fiscal Year. Use the dropdown to select a different year if appropriate.
   - **Bid Opening Date**: This date is the date that will close the bid to the public. On this date, COMMBUYS will no longer accept quotes for that bid and the Buyer will be able to open and view the quotes. This date can be changed in the same manner as the Available Date.
   - **Print Format**: Leave Bid Print as the default.

The optional fields at the bottom of the screen are available to choose either rolling or open enrollment.

   - **Enable Rolling Enrollment**: Selecting this checkbox allows you to accept bids and review them as they come.
   - **Enable Open Enrollment**: Selecting this checkbox allows the SSST to re-open the contract at any time (or at set intervals) to add new vendors.
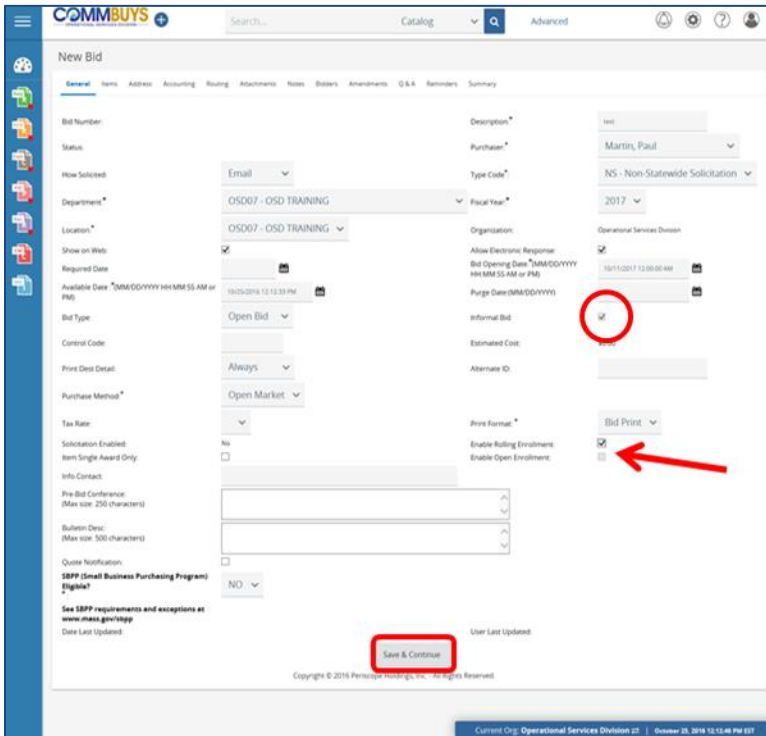
![OSD Logo]

OPERATIONAL SERVICES DIVISION

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Step 6: Selecting Rolling Enrollment

NOTE: To select Enable Open Enrollment, skip to Step 8.

1. Select the **Enable Rolling Enrollment** checkbox. When you do so, note that the Informal Bid checkbox automatically fills in with a checkmark.

2. Click on the **Save & Continue** button.
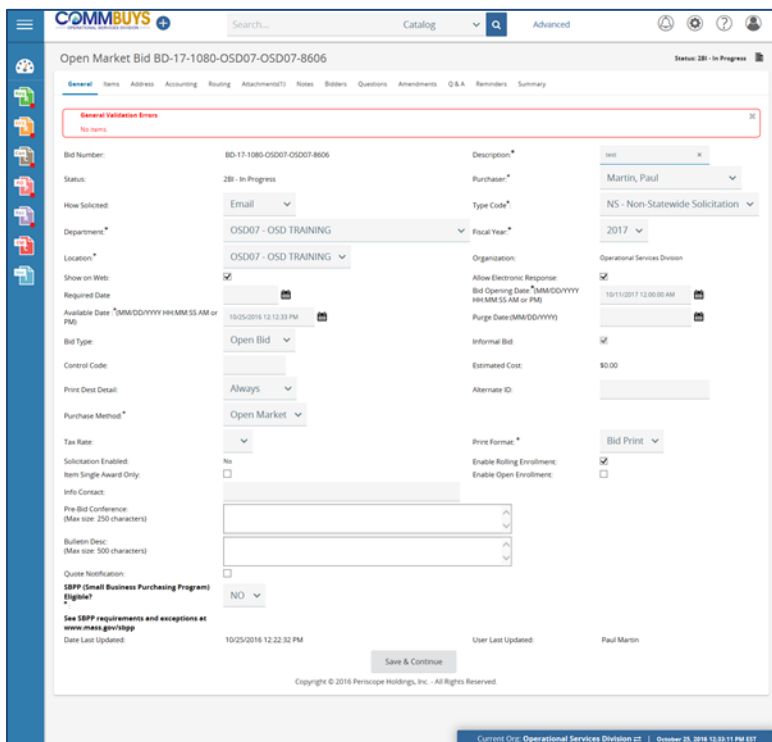
Step 7: Completing the Remaining Tabs

The General tab screen redisplays with a warning reminding you that no items have been selected. Continue working through the tabs from left to right filling in all the information, then scroll to the bottom of the Summary tab page and click on the **Submit for Approval** button.

NOTE: For additional information on completing the tab screens, the complete process is outlined in the Buyer Job Aid entitled *How to Create a Bid From Scratch*.

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Step 8: Selecting Open Enrollment

1. Select the **Enable Open Enrollment** checkbox. When you do so, note that the Informal Bid checkbox does not fill in with a checkmark.

2. Also note that an **Enrollment Periods** popup box displays – a function that will allow the user to enter the start date and end date of the open enrollment period. It also allows the user to add additional periods.

3. Once the period(s) has been entered, click on the **Add Enrollment Period** button.

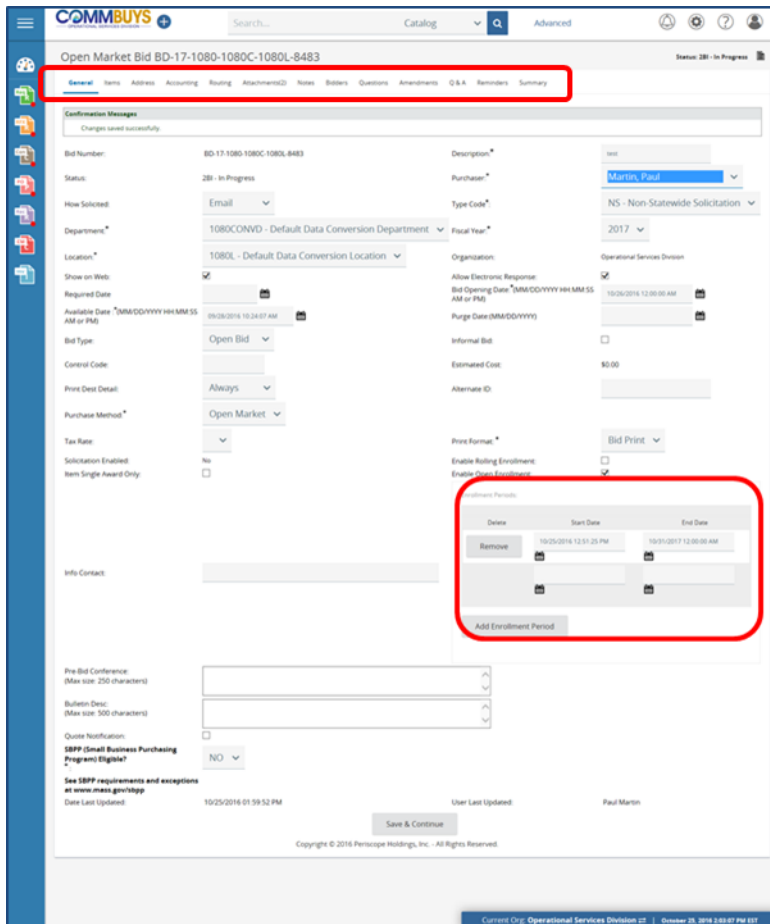4. Scroll to the bottom of the screen and click on the **Save & Continue** button.

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Step 9: Completing the Remaining Tabs

1. The General tab screen redisplays with the enrollment period filled in. Continue working through the tabs from left to right filling in all the information.

2. When you get to the Summary tab page, scroll to the bottom and click on the **Submit for Approval** button.

NOTE: For additional information on completing the tab screens, the complete process is outlined in the Buyer Job Aid entitled *How to Create a Bid From Scratch*.